

CITY OF SAN JOSE
OFFICE OF THE CITY AUDITOR
Procedure No. M-38

PROJECT SUMMARY AND MONETARY BENEFIT REPORT

Purpose

To write the project summary and the monetary benefit report and prepare the audit workpapers for storage.

Background

At the completion of the audit, the audit staff should write the project summary of the audit and the monetary benefit report. The audit staff should also prepare the audit workpapers for storage, including segregating the confidential from the non-confidential workpapers.

Procedure

Audit Staff	<ol style="list-style-type: none">1. Prepare a one-page project summary (5-07H).2. Complete the monetary benefit report (5-07J)3. Submit the project summary and the monetary benefit report to the Supervising Auditor and the City Auditor.
Supervising Auditor and City Auditor	<ol style="list-style-type: none">4. Review and approve the project summary and the monetary benefit report.
Audit Staff	<ol style="list-style-type: none">5. Fax the project summary to NALGA.6. File the project summary and the monetary benefit report with the audit workpapers.7. Separate the confidential from the non-confidential workpapers.8. Complete the workpaper index.9. Bundle the workpapers using cardboard covers.10. Complete the information for each bundle.11. Clearly identify the confidential workpaper bundles.12. Put the workpapers in boxes for storage.
Administrative Support Unit	<ol style="list-style-type: none">13. Send the audit workpapers to storage.